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# ADVANCED WORD, AND INTEGRATED MS OFFICE

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**SPRING 2009**



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# TRACKING AND MANAGING DOCUMENT CHANGES

- When two or more people collaborate on a document, one person usually creates and owns the document and the others review it.
- Reviewers can turn on the **Track Changes** feature so that the revisions they make to the document are recorded without the original text being lost.
- Changed text shows in a different color and underlined.
- Deleted text shows up in a comment balloon at the margin of the document and displays a vertical line in the margin to the left of any changed text to help you locate changes in the document.

# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

## ■ Follow these steps:

1. On the **View** menu, point to **Toolbars**.
2. Click on **Reviewing**. The Reviewing toolbar appears.
3. On the reviewing toolbar, click the **Track Changes** button. Any changes that you make will now be tracked.



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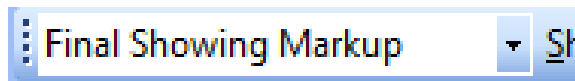
# PRACTICE #1

1. Run MS-Word
2. Open the file named **OriginalExcelLP** located in the teacher's course wiki space.
3. Activate the **Track Changes** feature.  
button.

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# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

- If the revision marks are distracting, you can track changes without showing them on the screen.
  - To hide revision marks:
    - Click the down arrow to the right of the **Display for Review** box and then click **Final**.
  - To show the revision marks again:
    - Click the down arrow to the right of the **Display for Review** box and then click **Final Showing Markup**.



# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)



## ■ Accept Changes

- ❑ You can use this feature to incorporate a change into the document.
- ❑ A change can be accepted individually by right-clicking on the changed text and then clicking **Accept Insertion.**
- ❑ However, if all changes need to be accepted at once, then click the arrow to the right of the **Accept Changes** button and click **Accept All Changes in Document.**

# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)



## ■ Reject Changes

- ❑ You can use this feature to refuse a change in the document.
- ❑ A change can be rejected individually by right-clicking on the changed text and then clicking **Reject Insertion.**
- ❑ However, if all changes need to be accepted at once, then click the arrow to the right of the **Reject Changes** button and click **Reject All Changes in Document.**

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# PRACTICE #2

1. Under the **MATERIALS** section add **Practice files**.
2. Replace the word **OBJECTIVE** with **GOAL**.
3. Accept the practice files changes.
4. Reject any other changes.

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# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

## ■ Saving Different Versions



- ❑ Provides a record of changes made to a document.
- ❑ Saving versions saves disk space because Word saves only the differences between versions, not an entire copy of each document.
- ❑ After saving several versions of the document, you can review, open, print, and delete earlier versions.

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# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

■ Follow these steps:

1. On the **File** menu, click on **Versions**. The versions dialog box appears, showing who saved the original version of the document.
2. Put a checkmark on **Automatically save a version on close** checkbox if you want to do this procedure when closing a document (optional).
3. Click the **Save Now** button. The **Save Version** dialog box appears.
4. In the **Comments on version** box, enter a description of the changes made in this version.
5. Click **OK**.

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## PRACTICE #3

1. Use Save Version feature to save changes to the document.
2. The description of this version should be called **Added Practice Files**.

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# TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

## ■ Adding Comments

- ❑ Allows to insert notes or comments, to ask questions or explain suggested edits.
- ❑ To insert a comment:
  1. Select the text to comment on.
  2. Click the **Insert Comment** button on the reviewing toolbar and type your comment.



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# ADDING COMMENTS

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# PROTECTING A DOCUMENT WITH A PASSWORD

- Allows certain people to be able to open a document.
- Follow these steps:
  1. Go to the **Tools** menu and click **Options**
  2. Click the **Security** tab to display the security options.
  3. In the **Password to open** box, enter a password and click **OK**.

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## PRACTICE #4

1. In the **Vocabulary** section, add a comment indicating some of the terms that will be discussed need to be included here.
2. Add a Password to open the document called **TeacherLP**.
3. Save Version using the description **Adding a Comment and a Password**.

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# COMPARING AND MERGING DOCUMENTS

- Allows to compare several versions of the same document.
- Word shows the differences as tracked changes.
- If several reviewers return their changes and comments in separate documents, these changes can all be merged into a single document for easier review.
- When you compare versions of a document, you see the reviewer's changes in revision marks even if the reviewers did not track their changes as they edited.

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# COMPARING AND MERGING DOCUMENTS (CONT.)

- Follow these steps:

1. Open the original document that was sent for review.
2. Go to the **Tools** menu and click **Compare and Merge Documents**. The Compare and Merge Documents dialog box appears.
3. Browse until you find the first document with revisions and select it.
4. Click the down arrow to the right of the **Merge** button, and then click **Merge into current document**.
5. Repeat steps 2-4 for additional reviewed documents.

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## PRACTICE #5

1. Use the files **JoeRevisionLP** and **MariaRevisionLP** to merge their changes with your document.
2. Accept all the changes.
3. Save Version using the description **Merged Revisions.**

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# CONTROL A DOCUMENT'S DESIGN WITH A TEMPLATE

- A template is a file that stores text, character and paragraph styles, page formatting, and macros for use as a pattern in creating other documents.
- MS-Word provides with a list of different templates to use for different occasions.
- In addition, MS-Word allows users to customize existing templates.

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# CONTROL A DOCUMENT'S DESIGN WITH A TEMPLATE (CONT.)

## ■ Using an existing template:

1. Go to the **File** menu and click **New**. The New document task pane appears on the right side of the screen.
2. On the task pane, click **On my computer....**. The Templates window appears (for online templates, click **Templates on Office Online** instead).
3. Browse the different tabs until you find a template that suits you and select it.
4. Click **OK**. A new document is created from the template
5. Provide the necessary information.

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## PRACTICE #6

1. Use the **Contemporary Memo** template to send a memo to your course coordinator.
2. Fill out the necessary information (you can use fictitious names if desired).
3. Save your document as **Memo<today's date>**. For example, if today's date is Feb 10, 2007 then the filename would be ***Memo02102007***

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# CONTROL A DOCUMENT'S DESIGN WITH A TEMPLATE (CONT.)

- **Saving Existing Template as a Different Template:**
  1. Do steps 1-5 under **Using an Existing Template**.
  2. Go to the **File** menu and click **Save As**. The Save As window appears.
  3. In the **Save as type** box, select **Document Template (\*.dot)**. The template by default will be placed in the Templates folder of Microsoft.
  4. Type a name for your template.
  5. Click **Save**. Your template is saved with other existing ones.

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# PRACTICE #7

1. Open the Template called **Elegant Letter**
2. Change the font of the title section to **Century Gothic**.
3. Change the date to italics.
4. Save this file as a Template under the name of **MyElegantLetter**.

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# MAIL MERGE

- You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements.
  - For example, in a letter that announces a new product...
  - your company logo and the text about the product will appear in each letter...
  - ...and the address and greeting line will be different in each letter.

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# MAIL MERGE

- There are four main steps in the mail merge process:
  1. Choosing a document type and main document.
  2. Connecting to a data file and connecting records
  3. Adding fields to the main document.
  4. Preview the merge and then complete it.

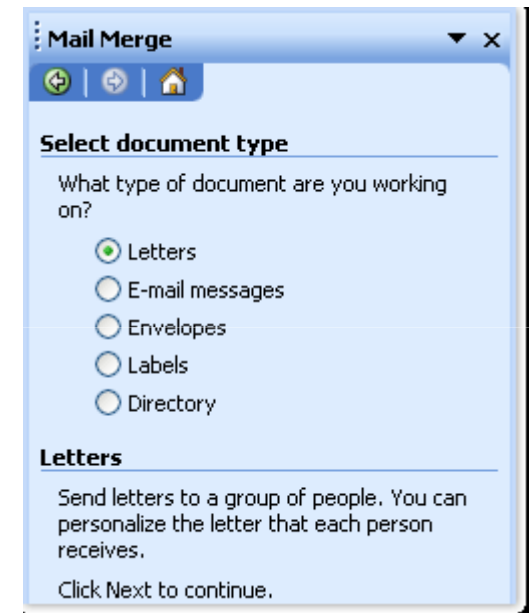
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# MAIL MERGE – START THE MM PROCESS

- Follow these steps (make sure you have a blank document):
  - On the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.
    - The **Mail Merge** task pane opens.
    - By using hyperlinks in the task pane, you navigate through the mail-merge process.

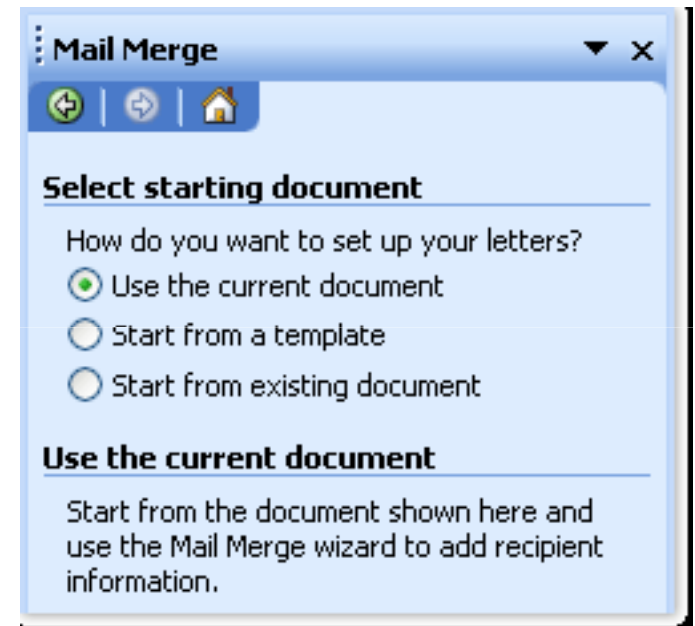
# MAIL MERGE – CHOOSING A DOCUMENT...

- The main document is the document that you start with.
- It's the model for all of the merged documents that you eventually create.
- This step in the mail-merge process involves two choices.
  1. First, you choose the type of document that you want to merge information into (e-mail, letters, envelopes, directory, or labels).
  2. Then, you choose the main document that you want to use.



# MAIL MERGE – CHOOSING A DOCUMENT...

- If your main document (called the **starting document** in the task pane) is already open, or you are starting with a blank document, you can click **Use the current document**.
- Otherwise, click **Start from a template** or **Start from existing document**, and then locate the template or document that you want to use.



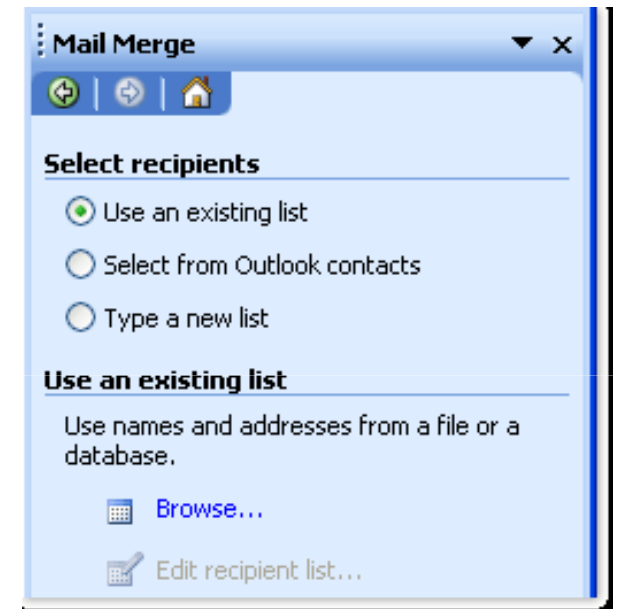
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## MAIL MERGE – CONNECTING TO A DATA FILE...

- To merge unique information into your main document, you must connect to (or create and connect to) the data file where the unique information is stored.
  - If you don't want to use all the data in the file in your merge, you can choose the records that you want to use.
  - In this step in the mail-merge process, you connect to the data file where the unique information that you want to merge into your documents is stored.
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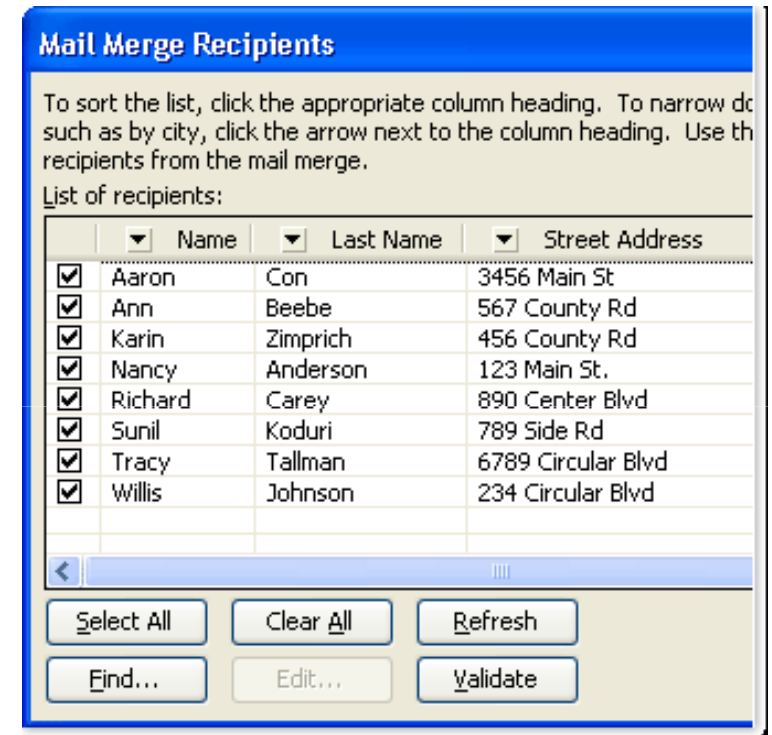
# MAIL MERGE – CONNECTING TO A DATA FILE...

- Existing lists for contacts could be located in Excel spreadsheets or Access databases and may be selected by choosing **Use an existing list**.
- If you have a contact list from Outlook, it can be imported for the mail merge process by typing **Select from Outlook Contacts**.
- If no contact list exists, you may create a new list by selecting **Type a new list**



# MAIL MERGE – CONNECTING TO A DATA FILE...

- Just because you connect to a certain data file doesn't mean that you have to merge information from all the records (rows) in that data file into your main document.
- After you connect to the data file that you want to use or create a new data file, the **Mail Merge Recipients** dialog box opens.
- You can select a subset of records for your mail merge by sorting or filtering the list



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# PRACTICE #8

1. Use Word Mail merge feature and either use **Elegant Merge Letter** template.
2. Create a new contact list, with five names (real or fictional) with city, state, zip, and phone numbers.
3. Save the contact list as **MyContacts** in your flashdrive (you may also attempt to bring your outlook contacts if any).

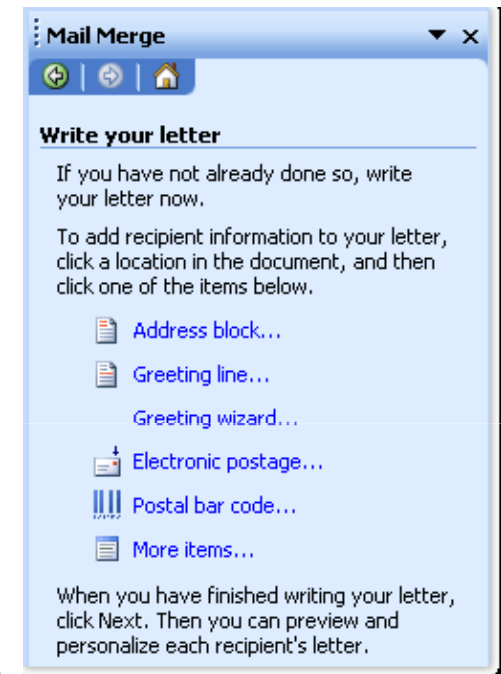
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# MAIL MERGE – ADDING FIELDS TO THE MAIN DOCUMENT

- After you connect your main document to a data file, you're ready to add fields that indicate where the unique information will appear in each copy of the document that you generate when you merge.
- To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to match fields.

# MAIL MERGE – ADDING FIELDS TO THE MAIN DOCUMENT

- If your main document is still blank, type the information that will appear in each copy.
- Then, add fields by clicking the hyperlinks in the task pane.
  - Fields are placeholders that you insert into the main document at locations where you want unique information to appear.
    - For example, you can click the **Greeting line** link in the task pane to add fields near the top of a new product letter, so that each recipient's letter contains a personalized greeting.
    - Fields appear in your document within chevrons, for example, «**AddressBlock**».



# MAIL MERGE – PREVIEW AND MERGE

- To preview, do any of the following:
  1. Page through each merged document by using the next and previous buttons in the task pane.
  2. Preview a specific document by clicking **Find a recipient**.
  3. Click **Exclude this recipient** if you realize you don't want to include the record that you are looking at.



# MAIL MERGE – PREVIEW AND MERGE

4. Click **Edit recipient list** to open the **Mail Merge Recipients** dialog box, where you can filter the list if you see records that you don't want to include.
5. Click **Previous** at the bottom of the task pane to go back a step or two if you need to make other changes.
6. When you are satisfied with the merge results, click **Next** at the bottom of the task pane.
7. What you do now depends on what type of document you're creating. If you are merging letters, you can print the letters or modify them individually. If you choose to modify the letters, Word saves them all to a single file, with one letter per page.



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# PRACTICE #9

1. Preview your merge
2. Click **Edit individual letters...** to proceed with the merge without printing them right away. Another document is created with each letter.
3. Edit and save your work as necessary.

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# MACROS

- You can automate tasks with a macro for those tasks you perform repeatedly in Microsoft Word.
- A macro is a series of commands that is stored in a Microsoft Visual Basic module and can be run whenever you need to perform the task.

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# RECORDING A MACRO

- Follow these steps:

1. On the **Tools** menu, point to **Macro**, and then click **Record New Macro**.
2. In the **Macro name** box, enter a name for the macro.
  - **Note:**
    - The first character of the macro name must be a letter.
    - Other characters can be letters, numbers, or underscore characters.
    - Spaces are not allowed in a macro name; an underscore character works well as a word separator.
3. In the **Store macro in** box, click the location where you want to store the macro.

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# RECORDING A MACRO

4. If you want to include a description of the macro, type it in the **Description** box.
5. Optionally, you may assign the macro to a key stroke.
6. Click **OK**.
7. Record the actions you want for the macro, and then on the **Stop Recording** toolbar, click **Stop Recording**.

# RUNNING A MACRO

- Follow these steps:

1. Open the presentation that contains the macro you want to run.
2. On the **Tools** menu, point to **Macro**, and then click **Macros**.
3. In the **Macro name** box, click the name of the macro that you want to run, and then do one of the following:
  - If you want to run a macro in a presentation, click **Run**.
  - If you want to run a macro from a Microsoft Visual Basic module, click **Edit**, and then in Microsoft Visual Basic Editor, click **Run Sub/UserForm** on the toolbar.

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## PRACTICE #10

1. Open **OriginalExcelLP**.
2. Record a Macro called **TeacherChangeAllFont**.  
The following actions should be recorded.
  - Highlight the entire document.
  - Change the font to **Garamond**
  - Change the font size of the title
  - Run Print preview
3. Go to the beginning of the document and run the macro.

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# SECURITY WITH MACROS

- Because macros can contain viruses, be careful about running them.
- Take the following precautions:
  - ❑ run up-to-date antivirus software on your computer
  - ❑ **set your macro security level to high**
  - ❑ **clear the Trust all installed add-ins and templates check box**
  - ❑ use digital signatures
  - ❑ maintain a list of trusted publishers.

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# SECURITY WITH MACROS

- Follow these steps:
  1. On the **Tools** menu, click **Options**.
  2. Click the **Security** tab.
  3. Under **Macro Security**, click **Macro Security**.
  4. Click the **Security Level** tab, and then select the security level you want to use.
  5. Click the **Trusted Publishers** tab.
  6. Remove the checkmark from the **trust all installed add-ins and templates check box**.
  7. Click **OK** twice.

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# INTEGRATING MS-OFFICE

## ■ Opening and Displaying Multiple Software Simultaneously

1. Open the **first** program.
2. **Minimize** the first program.
3. Open the **second** program.
4. **Maximize** the first program.
5. **Right-click** on the taskbar away from the minimized versions of the first and second program. A pop-up menu appears.
6. Click **Tile Windows Vertically** on the pop-up menu. You should now see the two programs displayed on screen side by side.

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# INTEGRATING MS-OFFICE

## ■ ***Embedding vs. Dynamic Linking***

- ❑ The advantage of **embedding** in this case is that your Excel data will be *physically* stored in your Word document.
- ❑ Thus, you can use that document in a computer that doesn't have Excel installed.
- ❑ However, it takes more disk space, since it has to save the spreadsheet data within the Word document.

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# INTEGRATING MS-OFFICE

## ■ ***Embedding vs. Dynamic Linking***

- ❑ On the other hand, the advantage of a **dynamic link** in this case is that when you change your data in Microsoft Excel, it will automatically change the Excel data in your Word document.
- ❑ Your Word document only possesses a link to the data; this data physically resides in an Excel spreadsheet file.
- ❑ Therefore, your Word document will take less disk space as opposed to using the embedding technique.
- ❑ The downside is that if you want to use the document in another computer, that computer **MUST** have Microsoft Excel.

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# INTEGRATING MS-OFFICE

## ■ ***Embedding a Chart from Excel into Word***

1. In MS Excel, move your mouse pointer over the chart until you see the words **Chart Area** displayed on a small box.
2. Click the mouse on that spot.
3. Go to the **Edit** menu and click **Copy**.
4. Switch to Microsoft Word and select the insertion point where you want to paste the chart.
5. Go to the **Edit** menu and click **Paste Special**.
6. Select **Microsoft Excel Chart Object**.
7. Select **Paste**.
8. Click **OK**.

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# PRACTICE #11

1. Use the column chart located in **NJIT Practice 1** and embed the chart after discussing the point about teaching students about creating and enhancing charts.
2. Save Version using the description **Adding an Embedded Chart**.

# INTEGRATING MS-OFFICE

- ***Creating a Dynamic Link between Excel and Word***
  - ❑ In Microsoft Excel, move your mouse pointer over the chart until you see the words **Chart Area** displayed on a small box.
  - ❑ Click the mouse on that spot.
  - ❑ Go to the **Edit** menu and click **Copy**.
  - ❑ Switch to Microsoft Word and select the insertion point, where you want to paste the chart.
  - ❑ Go to the **Edit** menu and click **Paste Special**.
  - ❑ Select **Microsoft Excel Chart Object**.
  - ❑ Select **Paste Link**.
  - ❑ Click **OK**.

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## PRACTICE #12

1. Use the line chart located in **NJIT Practice 1** and dynamically the chart after discussing the point about embedding and linking charts.
2. Save Version using the description **Adding a dynamically linked Chart.**

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# INTEGRATING MS-OFFICE

- **Using Spreadsheets In PowerPoint**
  - This allows you to display spreadsheets created in MS-Excel in your PowerPoint slides and edit them during your presentation.
    1. Do the steps for dynamic linking. However, you will be linking this time an Excel worksheet with PowerPoint.
    2. After the worksheet has been pasted to the slide, select it.
    3. Right-click on the worksheet.
    4. Click **Action Settings**.
    5. Under Mouse-Click tab, select **Object Action**.
    6. Select **Edit** from the drop down list.
    7. Click **OK**.

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## PRACTICE #13

1. Open the PowerPoint presentation called **NJIT Presentation 1**.
2. Add a new slide with the **Title and Text** layout. Its title should be **Excel Tips**
3. Use the Worksheet from **NJIT Practice 1** and put it in the new slide.
4. Run the presentation and click on the worksheet and see what happens.